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<b>14. ABSTRACT</b> Geopolitical and economic upheaval is shifting the balance of power on the Eurasian continent. Turkey's increasing assertiveness in the international system has resulted in its emergence as a growing regional hegemon that may complement or displace the influence of Russia, China, Iran, and the United States. The United States must consider Turkey's rise and be aware of the strategic risks and opportunities. A powerful and influential Turkey is inevitable, but competition with the United States is not. Through focused diplomacy and mutual respect, the United States can seize opportunities and mitigate risks associated with Ankara's ascendance.									
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A Shifting Eurasian Strategic Balance:

The Rise of Turkey



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## **Introduction**

Geopolitical and economic upheaval is shifting the balance of power on the Eurasian continent. Turkey's increasing assertiveness in the international system has resulted in its emergence as a growing regional hegemon that may complement or displace the influence of Russia, China, Iran, and the United States. The U.S. must therefore change how it handles diplomatic and military relationships in the region to account for Turkey's willingness and capability to forcefully assert its interests in Europe, Asia, Africa, and the Middle East.

## **Geostrategic Background**

Over the past decade, a confluence of upheaval in China, Russia, and Iran has facilitated strategic opportunities for Turkey. Russian and Iranian spheres of influence in Central Asia and the Middle East appear vulnerable, while China's economic sway over Central Asian and African nations may wane. The Kremlin's unwillingness or inability to uphold its security guarantees and fallout from the invasion of Ukraine have resulted in declining Russian influence in Central Asia, the Caucasus, and the Middle East. Additionally, sanctions have placed significant strain on Iran's economy, spurring persistent internal discontent and placing the regime on delicate footing. Meanwhile, the Chinese Communist Party's (CCP) policies have slowed economic growth and increased domestic unrest, causing its leadership to refocus attention internally. Turkey, with NATO's second-largest armed force and a growing industrial base, now has an increasing penchant for asserting its economic, security, and diplomatic interests abroad.

## *Russian Decline*

Russia has demonstrated inconsistent capability or willingness to maintain traditional security guarantees in Central Asia, the Caucasus, and the Middle East, unlocking opportunities for Turkey to emerge as a viable alternative. The 2020 war between Turkish-backed Azerbaijan and Armenia, a Russian client state, is emblematic of the Kremlin's ineptitude. Russia's president, Vladimir Putin, ignored his country's treaty with Armenia and allowed the Turkish-supported Azerbaijani military to decisively defeat his Armenian allies.<sup>1</sup>

Putin's disdain for Armenian Prime Minister Nikol Pashinyan likely influenced the decision to abandon Armenia and reveals that the Russian-led Collective Security Treaty Organization (CSTO) is weak and lacks the accountability and deterrence value of NATO's Article Five guarantee.<sup>2</sup> Furthermore, Western involvement in peace negotiations between Azerbaijan and Armenia is evidence of the decline of Russia's leadership and the willingness of Armenia to turn elsewhere for assistance.<sup>3</sup>

CSTO partners, fearing for their sovereignty, are unnerved by Russia's invasion of Ukraine and proposed annexation of Northern Kazakhstan.<sup>4</sup> The Kremlin's erratic behavior has created a delicate balancing act in Central Asia and Eastern Europe, with Belarus being the only

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<sup>1</sup> The Economist, "Armenia and Azerbaijan End a 30-Year Conflict with a Tense Peace Deal" (London, November 10, 2020), <https://www.economist.com/europe/2020/11/10/armenia-and-azerbaijan-end-a-30-year-conflict-with-a-tense-peace-deal>. Accessed 21 January 2023

<sup>2</sup> The Economist, "Armenia and Azerbaijan End a 30-Year Conflict with a Tense Peace Deal."

<sup>3</sup> Scott Strgacich, "Is the CSTO on the Brink of Collapse?," The National Interest, December 1, 2022, <https://nationalinterest.org/feature/csto-brink-collapse-205956>. Accessed 21 January 2023

<sup>4</sup> Alimana Zhanmukanova, "Russian Foreign Minister Finally Responds to Kazakh Sovereignty Worries," The Diplomat, May 11, 2021, <https://thediplomat.com/2021/05/Russian-foreign-minister-finally-responds-to-kazakh-sovereignty-worries/>. Accessed 21 January 2023

ally supporting the war in Ukraine.<sup>5</sup> Poor Russian military performance also undermines the value of its security guarantees. The Ukrainian conflict is stalemated largely due to sloppy Russian training and preparation.<sup>6</sup> Battlefield losses have emboldened leaders such as Kazakhstan President Kassym-Zhomart Tokayev, who has welcomed Russian draft dodgers.<sup>7</sup>

In addition to Russia's volatile foreign policy and messaging, the invasion of Ukraine is a significant resource drain with considerable military, economic, and reputational consequences. Russia's GDP decline of 4% in 2022 makes it the worst-performing economy of any world power.<sup>8</sup> While Russia can continue to fund the war from its ample (\$120 billion) reserves, defense and internal security spending in 2022 increased by 31% and 19%, respectively.<sup>9</sup> Expenditures will inevitably rise with future requirements, including expanded troop mobilization, replacement costs, and the suppression of growing internal dissent. Western economic and military support for Ukraine, coupled with lower projected hydrocarbon revenues due to sanctions, could result in a significant Russian resource drain if the war protracts.<sup>10</sup>

The December 2022 summit between Syrian, Turkish, and Russian defense ministers may be evidence of Russian overextension. The first trilateral meeting of its kind in 11 years

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<sup>5</sup> Alexander E. Gale, "Has Russia's War in Ukraine Killed the CSTO?," *The National Interest*, October 24, 2022, <https://nationalinterest.org/feature/has-russia%E2%80%99s-war-ukraine-killed-csto-205466>. Accessed 21 January 2023

<sup>6</sup> Robert McKeown, "Assessing Military Capability: More than Just Counting Guns," *Proceedings* (U.S. Naval Institute, December 2022), <https://www.usni.org/magazines/proceedings/2022/december/assessing-military-capability-more-just-counting-guns>. Accessed 21 January 2023

<sup>7</sup> *The Economist*, "Old Politics in the 'New Kazakhstan'" (London, November 17, 2022), <https://www.economist.com/asia/2022/11/17/old-politics-in-the-new-kazakhstan>. Accessed 21 January 2023

<sup>8</sup> *The Economist*, "Economic Data, Commodities and Markets" (London, December 20, 2022), <https://www.economist.com/economic-and-financial-indicators/2022/12/20/economic-data-commodities-and-markets>. Accessed 21 January 2023

<sup>9</sup> Sergey Aleksashenko, "Does Russia Have Enough Money for War?," *Al Jazeera*, December 5, 2022, <https://www.aljazeera.com/opinions/2022/12/5/does-russia-have-enough-money-for-war>.

<sup>10</sup> Aleksashenko, "Does Russia Have Enough Money for War?"

focused on developing ways to “resolve the Syrian Crisis.”<sup>11</sup> The sudden willingness of Moscow to broker a deal could be evidence that it can no longer afford extensive military support for the Assad regime against Turkish-backed rebel groups. Cracks in Russian security guarantees in the Middle East, like those in Central Asia and the Caucasus, would introduce a significant shift in the power balance.

### *Iranian Instability*

Turkey’s economy is briskly expanding and benefits from numerous economic partnerships, while Iran, a regional rival, is cracking under foreign pressure and internal instability. Economic decline amid U.S.-imposed sanctions on Iran has spurred widespread social unrest. Income per person has stagnated for the past decade, rampant inflation has impoverished Iranians, and a currency crisis is brewing.<sup>12 13</sup> Country-wide protests that started in September 2022 have shown some signs of abating; however, with recent averages of 16 demonstrations per day recorded by the Armed Conflict Location and Event Data Project (ACLED), the regime appears vulnerable.<sup>14 15</sup> Government crackdowns have been harsh and widespread discontent remains.<sup>16</sup> According to ACLED data, the uprising ranks among the largest movements on

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<sup>11</sup> Associated Press, “Turkish, Syrian, Russian Defense Chiefs Hold Surprise Talks,” Time, December 28, 2022, <https://time.com/6243676/turkey-syria-russia-surprise-talks/>. Accessed 21 January 2023

<sup>12</sup> Behrang Tajdin, “How Iran’s Economic Woes Created Conditions Ripe for Protests,” BBC, October 11, 2022, <https://www.bbc.com/news/world-middle-east-63154987>. Accessed 21 January 2023

<sup>13</sup> The Economist, “Iran’s Tired Regime Is Living on Borrowed Time” (London, September 29, 2022), <https://www.economist.com/leaders/2022/09/29/irans-tired-regime-is-living-on-borrowed-time>. Accessed 21 January 2023

<sup>14</sup> The Economist, “Protest Movements as Deadly as Iran’s Often End in Revolution or Civil War” (London, December 8, 2022), <https://www.economist.com/graphic-detail/2022/12/08/protest-movements-as-deadly-as-irans-often-end-in-revolution-or-civil-war>. Accessed 21 January 2023

<sup>15</sup> The Economist, “Protests Have Subsided in Iran, but Clerics Cannot yet Proclaim Victory,” January 12, 2023, <https://www.economist.com/middle-east-and-africa/2023/01/12/protests-have-subsided-in-iran-but-clerics-cannot-yet-proclaim-victory>. Accessed 21 January 2023

<sup>16</sup> The Economist, “Protests Have Subsided in Iran, but Clerics Cannot yet Proclaim Victory.”

record, comparable to the overthrow of the Shah in 1979.<sup>17</sup> Countries with similar statistics have experienced revolutions, coups, or civil wars 50% of the time.<sup>18</sup>

Relative power in the Caucasus and Middle East could shift as Iran grows less capable of supporting its clients and an assertive Turkey pursues strategic goals. Over the last two decades, Iran established dominance over Lebanon, Yemen, Syria, and Iraq through political manipulation and support for proxy militias.<sup>19</sup> With the Iranian regime and economy destabilizing, future interventionist foreign policy may be less feasible. Iranian leadership has historically supported Armenia as a counterweight to Azerbaijan, a rival border state.<sup>20</sup> However, a Turkish-Azerbaijani strategic partnership soundly defeated Armenia in 2020 and threatens Iranian regional dominance. Showing solidarity and strength, Turkey and Azerbaijan conducted military drills in December 2022 near the Iranian border that included advanced tactics and F-16 fighter jets.<sup>21</sup> Turkish military success in Syria, another Iranian client, has resulted in a Turkish-governed occupation zone. As domestic instability increases and competitors emerge, Iranian regional dominance could fade.<sup>22</sup>

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<sup>17</sup> The Economist, "Protest Movements as Deadly as Iran's Often End in Revolution or Civil War."

<sup>18</sup> The Economist, "Protest Movements as Deadly as Iran's Often End in Revolution or Civil War."

<sup>19</sup> Karim Sadjadpour, "Iran's Hollow Victory: The High Price of Regional Dominance," *Foreign Affairs* 101 (New York: Council on Foreign Relations NY, 2022), 30, ProQuest. Accessed 21 January 2023

<sup>20</sup> Tara's Kuzio, "War a Possibility as Iran-Azerbaijan Tensions Flare," *Geopolitical Monitor*, November 21, 2022, <https://www.geopoliticalmonitor.com/war-remains-a-possibility-as-iran-azerbaijan-tensions-flare/>. Accessed 21 January 2023

<sup>21</sup> Joshua Kucera, "Azerbaijan and Turkey in Joint Military Exercises on Iranian Border," *Eurasianet*, December 7, 2022, <https://eurasianet.org/Azerbaijan-and-turkey-in-joint-military-exercises-on-iranian-border>. Accessed 21 January 2023

<sup>22</sup> The Economist, "Turkey Is Wielding Influence All over the Arab World" (London, August 1, 2020), <https://www.economist.com/middle-east-and-africa/2020/08/01/turkey-is-wielding-influence-all-over-the-arab-world>. Accessed 21 January 2023

## *Challenges in China*

A refocus inward by Beijing in the coming decade may force developing nations to look elsewhere for economic support. Over the past decade, China garnered headlines by investing and lending in strategically important countries. However, Chinese average annual international investment contracted by 72% in 2020–2021 compared to 2015–2019.<sup>23</sup> Furthermore, China closed its borders during the pandemic, and President Xi Jinping halted most diplomatic travel.<sup>24</sup> This sudden pullback in Chinese economic and political engagement was partially related to Covid-19 control measures. However, CCP policies have created additional economic and political issues that may impact long-term overseas commitments.

Fallout from zero-Covid policies, a real estate collapse, and a technology company crackdown could foster domestic unrest and economic upheaval, further reducing China's footprint abroad. China's oppressive zero-Covid policies triggered widespread protests rarely seen in the communist state.<sup>25</sup> China's sudden lifting of these restrictions is now causing rapid spread of Covid-19 in a country unaccustomed to managing the virus on a large scale. Statistical models have forecasted 1.5 million deaths in the first quarter of 2023.<sup>26</sup> Since Chinese leaders

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<sup>23</sup> García-Herrero Alicia, "Will the Belt and Road Initiative Be Another Casualty of the Pandemic?," *Georgetown Journal of International Affairs*, November 11, 2022, <https://gjia.georgetown.edu/2022/11/11/will-the-belt-and-road-initiative-be-another-casualty-of-the-pandemic/>. Accessed 21 January 2023

<sup>24</sup> *The Economist*, "Xi Jinping Will at Last Venture Abroad Again" (London, September 8, 2022), <https://www.economist.com/china/2022/09/08/xi-jinping-will-at-last-venture-abroad-again>. Accessed 21 January 2023

<sup>25</sup> *The Economist*, "China Is Still Punishing Those Who Protested against Zero-Covid" (London, January 12, 2023), <https://www.economist.com/china/2023/01/12/china-is-still-punishing-those-who-protested-against-zero-covid>. Accessed 21 January 2023

<sup>26</sup> *The Economist*, "A Wave of Covid-19 Reveals Flaws in China's Health System" (London, December 19, 2022), <https://www.economist.com/china/2022/12/19/a-wave-of-covid-19-reveals-flaws-in-chinas-health-system>. Accessed 21 January 2023

defined their legitimacy based on Covid control, the virus' human toll could lead to increased social instability.

In 2020, the CCP imposed regulations constraining homebuilders' access to financing to curb property speculation.<sup>27</sup> The resulting real estate crash led to mortgage defaults and spurred demonstrations by investors and prospective homeowners.<sup>28 29</sup> Despite policymakers' efforts, a near-term rebound in the property market appears unlikely.<sup>30</sup> Additionally, a crackdown on what authorities describe as a "disorderly expansion of capital" resulted in over \$1 trillion in lost market value from Chinese technology companies.<sup>31</sup> Combined with increasing strategic competition with the United States, these policies have yielded a slowing economy and increased social unrest. In the coming decade, China may have to devote more financial and political capital toward internal concerns such as health care, technological industrial policy, and housing.

### **The Turkish Challenge to Established Powers**

Turkish ascendancy in the last decade reflects the desire of its president, Recep Tayyip Erdogan, to restore the lost glory of the Ottoman Empire and position Turkey as a Eurasian

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<sup>27</sup> The Economist, "China's Bid to Stabilise Its Property Market Is Causing Jitters" (London, September 4, 2021), <https://www.economist.com/china/2021/09/04/chinas-bid-to-stabilise-its-property-market-is-causing-jitters>. Accessed 21 January 2023

<sup>28</sup> The Economist, "China's Property Crisis Hasn't Gone Away: It Is Getting Worse" (London, September 15, 2022), <https://www.economist.com/leaders/2022/09/15/chinas-property-crisis-hasnt-gone-away-it-is-getting-worse>. Accessed 21 January 2023

<sup>29</sup> The Economist, "Protesters in China Besiege an Indebted Property Developer," September 18, 2021, <https://www.economist.com/china/2021/09/18/protesters-in-china-besiege-an-indebted-property-developer>. Accessed 21 January 2023

<sup>30</sup> The Economist, "Only a Revived Economy Can Save China's Property Industry" (London, November 17, 2022), <https://www.economist.com/finance-and-economics/2022/11/17/only-a-revived-economy-can-save-chinas-property-industry>. Accessed 21 January 2023

<sup>31</sup> Don Weinland, "Xi Jinping's Crackdown on Chinese Tech Firms Will Continue," The Economist (London, November 8, 2021), <https://www.economist.com/the-world-ahead/2021/11/08/xi-jinpings-crackdown-on-chinese-tech-firms-will-continue>. Accessed 21 January 2023

hegemon.<sup>32</sup> The resulting expansion of Turkish economic, military, and diplomatic influence has increased its international footprint. Furthermore, Turkey holds comparative advantages in culture, diplomacy, expertise, and geography that will foster continued growth.

*Turkish Industrial, Military, and Geographic Advantages*

Turkey's growing defense industry and large military trained to NATO standards make it a credible alternative to Russia as a security partner. The Turkish army once relied on foreign suppliers for 70% of its equipment.<sup>33</sup> That figure is now only 30%.<sup>34</sup> Its defense industry did \$10.2 billion in sales in 2021, and Turkey is a net exporter of high-end military kit to a diverse range of customers. Turkish TB-2 drones were used with significant operational impact by the Ethiopian military in its civil war in Tigray, Azerbaijani forces in the victory over Armenia, and the Ukrainians against Russian aggression.<sup>35</sup>

Turkish forces have extensive operational experience and control bases in Libya, Oman, and Somalia. Its troops are fighting Kurdish insurgents in Syria and Iraq and have established a Turkish-administered buffer region in Northern Syria.<sup>36</sup> Turkish troops also operate in Libya, and its frigates patrol the Libyan coast.<sup>37</sup> Turkey regularly conducts military exercises with the

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<sup>32</sup> The Economist, "Turkey's Shallow Ottomania" (London, August 4, 2016), <https://www.economist.com/prospero/2016/08/04/turkeys-shallow-ottomania>. Accessed 21 January 2023

<sup>33</sup> The Economist, "Turkey Is the Arms Industry's New Upstart" (London, February 12, 2022), <https://www.economist.com/europe/2022/02/12/turkey-is-the-arms-industrys-new-upstart>. Accessed 21 January 2023

<sup>34</sup> Economist, "Turkey Is the Arms Industry's New Upstart."

<sup>35</sup> The Economist, "Turkey Is the Arms Industry's New Upstart."

<sup>36</sup> Salim Çevik, "Turkey's Military Operations in Syria and Iraq," Stiftung Wissenschaft Und Politik, May 30, 2022, <https://www.swp-berlin.org/en/publication/turkeys-military-operations-in-syria-and-iraq>. Accessed 21 January 2023

<sup>37</sup> The Economist, "Turkey Is Wielding Influence All over the Arab World."

NATO alliance and non-NATO allies such as Azerbaijan and Pakistan.<sup>38 39</sup> Turkish military expertise, equipment, and training make it a sought-after ally.

Its civilian industrial capability and a growing economy make Turkey a compelling economic partner. Its best firms manufacture high-quality capital goods, approaching German productivity at a lower cost.<sup>40</sup> Turkey's construction industry is world-renowned. Of the world's top 250 biggest contractors, 40 are Turkish.<sup>41</sup> On African infrastructure projects, it competes favorably on quality and pace of work with Chinese rivals.<sup>42</sup> Many Sub-Saharan African leaders, after travel to Libya, admired the high-quality infrastructure Turkish firms constructed and sought to replicate similar achievements.<sup>43</sup> As Chinese investment wanes and African nations question Chinese motivation thanks to Western persuasion, Turkish business is a likely beneficiary.

Turkey also possesses a large domestic market of 85 million, primarily young consumers, making it attractive to exporting countries in Asia, Europe, and Africa.<sup>44</sup> Its geographic position, straddling Asia and Europe, makes it a link between east and west. Shipping costs and transit times from Turkey to Europe are far lower than from China, making Turkey an economic hub.<sup>45</sup> European businesses seeking shorter, more diverse supply chains see Turkey as an alternative to

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<sup>38</sup> "Turkish, Pakistani Militaries Hold Joint Drill in Karachi," Daily Sabah, December 27, 2022, <https://www.dailysabah.com/politics/diplomacy/turkish-pakistani-militaries-hold-joint-drill-in-karachi>. Accessed 21 January 2023

<sup>39</sup> Kucera, "Azerbaijan and Turkey in Joint Military Exercises on Iranian Border."

<sup>40</sup> The Economist, "How Has Turkey's Economy Kept Growing despite Raging Inflation?" (London, July 21, 2022), <https://www.economist.com/briefing/2022/07/21/how-has-turkeys-economy-kept-growing-despite-raging-inflation>. Accessed 21 January 2023

<sup>41</sup> The Economist, "Turkish Builders Are Thriving in Africa" (London, May 7, 2022), <https://www.economist.com/business/2022/05/07/turkish-builders-are-thriving-in-africa>. Accessed 21 January 2023

<sup>42</sup> The Economist, "Turkish Builders Are Thriving in Africa."

<sup>43</sup> The Economist, "Turkish Builders Are Thriving in Africa."

<sup>44</sup> The Economist, "How Has Turkey's Economy Kept Growing despite Raging Inflation?"

<sup>45</sup> The Economist, "How Has Turkey's Economy Kept Growing despite Raging Inflation?"

China.<sup>46</sup> Additionally, its strategic position at the mouth of the Black Sea makes it a key partner for nations that require the Turkish strait for access to the Mediterranean.

### *Turkish Religious and Cultural Advantages*

Turkey also benefits strategically from its culture and religion. Despite its origins as a secular democracy, President Erdogan has bolstered Islamic influences in politics and diplomacy, facilitating partnerships with like-minded nations like Somalia and Qatar. The Turkish military mission in Somalia trains and equips 5,000 Somali soldiers in the fight against Al-Shabab.<sup>47</sup> Turkish commercial success in Somalia is facilitated by a common religion. One Turkish businessman explains, “In Somalia one of the advantages of being a Turk is that you pray at the same mosques as everyone else.”<sup>48</sup> Turkey’s military partnership with Qatar was negotiated thanks to both countries’ support for Islamist ideology during the Arab Spring.<sup>49</sup> The partnership provides up to 5,000 Turkish troops stationed in Doha, giving Turkey a strategic foothold in the Persian Gulf and an economic connection with a rich petrostate.<sup>50</sup>

President Erdogan also utilizes ethnic and religious ties to build multinational partnerships. The Organization of Turkic States (OTS), founded in 2021, includes many Central Asian and Eastern European countries in Russia's traditional security sphere, including Kazakhstan, Kyrgyzstan, and Uzbekistan. The organization’s stated goals are strengthening

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<sup>46</sup> The Economist, “How Has Turkey’s Economy Kept Growing despite Raging Inflation?”

<sup>47</sup> The Economist, “Turkey Is Making a Big Diplomatic and Corporate Push into Africa” (London, April 23, 2022), <https://www.economist.com/middle-east-and-africa/2022/04/23/turkey-is-making-a-big-diplomatic-and-corporate-push-into-africa>. Accessed 21 January 2023

<sup>48</sup> The Economist, “Turkey Is Making a Big Diplomatic and Corporate Push into Africa.”

<sup>49</sup> The Economist, “How Qatar and Turkey Came Together” (London, January 21, 2021), <https://www.economist.com/middle-east-and-africa/2021/01/21/how-qatar-and-turkey-came-together>. Accessed 21 January 2023

<sup>50</sup> The Economist, “How Qatar and Turkey Came Together.”

economic growth and promoting cultural and religious initiatives.<sup>51</sup> Rivalry and division in Central Asia have historically benefited China and Russia diplomatically and economically. If the OTS thrives as a unifying force under Turkish leadership, it could counter Chinese and Russian strategic interests.<sup>52</sup>

### *Turkish Diplomatic Prowess*

Careful diplomacy in recent years has further benefitted Turkey's strategic position through diverse alliances and partnerships. Although a member of NATO, Turkey is friendly with Moscow. It also has economic agreements with the EU but is not a member. This web of international relationships facilitates unique benefits. When Russia invaded Ukraine, Turkey sold drones and patrol boats to the Ukrainians and invoked an international treaty to stop Russia from reinforcing its Black Sea Fleet.<sup>53</sup> However, Turkey is not bound by EU sanctions and has continued to strengthen its economic and diplomatic ties with the Kremlin. Presidents Erdogan and Putin communicate regularly by phone, and bilateral trade has doubled.<sup>54</sup> Turkish-Russian relations have survived despite being on opposite sides of conflicts in Syria and the Caucasus. President Erdogan also gained international prestige by negotiating a deal to allow Ukrainian grain shipments through the Black Sea, alleviating fears of a hunger crisis.<sup>55</sup> Using its unique

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<sup>51</sup> Nurettin Akcay, "Does the Organization of Turkic States Worry China and Russia?," *Diplomat* (Rozelle, N.S.W.) (Tokyo: Tribune Content Agency LLC, November 22, 2022), <https://thediplomat.com/2022/11/does-the-organization-of-turkic-states-worry-china-and-russia/>. Accessed 21 January 2023

<sup>52</sup> Akcay, "Does the Organization of Turkic States Worry China and Russia?"

<sup>53</sup> *The Economist*, "Why Vladimir Putin and Recep Tayyip Erdogan Need Each Other" (London, October 12, 2022), <https://www.economist.com/europe/2022/10/12/why-vladimir-putin-and-recep-tayyip-erdogan-need-each-other>. Accessed 21 January 2023

<sup>54</sup> *The Economist*, "Why Vladimir Putin and Recep Tayyip Erdogan Need Each Other."

<sup>55</sup> *The Economist*, "Odessa's Port May Soon Be Reopened" (London, July 21, 2022), <https://www.economist.com/europe/2022/07/21/odessas-port-may-soon-be-reopened>. Accessed 21 January 2023

diplomatic networks, Turkey has reaped benefits from the Ukraine conflict by prospering outside the Western sanction regime and building diplomatic clout.

Turkey has also exploited Sweden and Finland's fear of Russian aggression. As a voting member of NATO, it is blocking Swedish and Finnish membership until it extracts concessions on the countries' alleged support of the Kurdistan Workers Party (PKK), a terrorist organization that Turkey is struggling to contain.<sup>56</sup> Erdogan is using his veto on accession to refocus NATO members' attention on a critical Turkish interest, combating Kurdish militant groups.

Although Chinese diplomacy has garnered headlines, the rapid expansion of Turkish influence in Africa has largely gone unnoticed. The number of Turkish diplomatic missions in Africa has increased from 12 in 2009 to 43 in 2022.<sup>57</sup> Commerce has also rapidly expanded, with Sub-Sahara trade growing eightfold since 2003.<sup>58</sup> Deliberate messaging has fostered the growth of Turkish soft power in Africa as well. In the past, Turkey funneled aid through UN agencies; however, by 2019, only 2% of African assistance was channeled this way. Instead, Turkish flags adorn food packages, schools, and wells.<sup>59</sup> Thirty African nations have signed security agreements with Turkey since 2017, and Turkish arms sales in the region are growing.<sup>60</sup> Turkey's advantage is that, unlike Western competitors, it does not lecture African nations about the ethical use of weaponry. This policy makes it a favored ally to leaders such as Abiy Ahmed in Ethiopia, who employed morally dubious tactics during the recent civil war in Tigray.<sup>61</sup> Turkish

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<sup>56</sup> "Turkey's Erdogan Renews Threat To Block NATO Bids By Sweden, Finland," Radio Free Europe Radio Liberty, October 1, 2022, <https://www.rferl.org/a/turkey-nato-veto-sweden-finland/32060917.html>. Accessed 21 January 2023

<sup>57</sup> The Economist, "Turkey Is Making a Big Diplomatic and Corporate Push into Africa."

<sup>58</sup> The Economist, "Turkey Is Making a Big Diplomatic and Corporate Push into Africa."

<sup>59</sup> The Economist, "Turkey Is Making a Big Diplomatic and Corporate Push into Africa."

<sup>60</sup> Nebahat Tanrıverdi Yaşar, "Unpacking Turkey's Security Footprint in Africa," Stiftung Wissenschaft Und Politik, 2022, <https://www.swp-berlin.org/publikation/unpacking-turkeys-security-footprint-in-africa>. Accessed 21 January 2023

<sup>61</sup> The Economist, "Turkey Is Making a Big Diplomatic and Corporate Push into Africa."

history is also a strength. Their diplomatic guarantees are more attractive; Wamkele Mene, Secretary-General of the African Continental Free Trade Area (AfCFTA), stresses, “Turkey is coming in with no colonial baggage whatsoever, that’s an advantage.”<sup>62</sup>

### **Headwinds to Turkish Growth**

While Turkey's international influence has grown considerably, headwinds may challenge its staying power as a regional hegemon. Growing domestic economic and political uncertainty could influence its foreign policy. Additionally, Turkey’s international ambitions often clash with those of other NATO members, notably the United States, France, and Greece.

#### *Economic*

Turkey is facing difficult economic conditions that threaten to undermine its foreign policy program. The Turkish lira has sharply declined against the dollar, losing 75% of its value since 2018.<sup>63</sup> Year-over-year annual inflation in December 2022 exceeded 70%.<sup>64</sup> Conventional monetary policy would dictate combatting inflation and currency devaluation with higher interest rates; however, Turkey lacks an independent central bank, and the president has responded by lowering rates to juice economic growth.<sup>65</sup> Central bank purchases of lira and currency exchange restrictions have stemmed the currency’s slide somewhat, but price inflation is a major domestic concern and is causing discontent among voters, potentially undermining President Erdogan’s

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<sup>62</sup> The Economist, “Turkey Is Making a Big Diplomatic and Corporate Push into Africa.”

<sup>63</sup> The Economist, “The Connection between Russian Sanctions and Bizarre Turkish Monetary Policy” (London, August 25, 2022), <https://www.economist.com/finance-and-economics/2022/08/25/the-connection-between-russian-sanctions-and-bizarre-turkish-monetary-policy>. Accessed 21 January 2023

<sup>64</sup> The Economist, “Economic Data, Commodities and Markets.”

<sup>65</sup> The The Economist, “The Latest Desperate Attempt to Prop up the Turkish Lira” (London, June 30, 2022), <https://www.economist.com/finance-and-economics/2022/06/30/the-latest-desperate-attempt-to-prop-up-the-turkish-lira>.

mandate.<sup>66</sup> This unorthodox monetary policy could also thwart foreign direct investment and weaken economic partnerships if the Turkish financial landscape appears unpredictable.

### *Political*

President Erdogan is unpopular domestically and faces an election in June 2023. Opinion polls reflect Erdogan losing a free and fair election against many opposition party candidates.<sup>67</sup> As a result, the president has suppressed dissent by jailing political opponents and journalists on terrorism charges. A new “disinformation” law carries a punishment of three years in prison.<sup>68 69</sup> These policies appear to be a coordinated effort to manipulate the election, and many fear that Erdogan will try to hold power at all costs, eroding democratic norms in Turkey.<sup>70 71</sup>

The political situation could alter Turkish foreign policy in several ways. While Western nations have remained largely silent on Erdogan’s growing autocratic tendencies, if he retains power through overt oppression, that may change. Sanctions or other punitive diplomatic measures could hobble its ambitious foreign policy agenda. Even a peaceful transfer of power could result in tempered international ambition. The opposition is campaigning to overhaul the presidential system, restore power to parliament, and shore up state institutions.<sup>72</sup> These efforts

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<sup>66</sup> The Economist, “The Latest Desperate Attempt to Prop up the Turkish Lira.”

<sup>67</sup> The Economist, “Turkey’s Centenary Could Mark the End of the Erdogan Era” (London, November 18, 2022), <https://www.economist.com/the-world-ahead/2022/11/18/turkeys-centenary-could-mark-the-end-of-the-erdogan-era>. Accessed 21 January 2023

<sup>68</sup> The Economist, “As Turkey Imposes a Harsh ‘Disinformation’ Law, Critics Fear the Worst” (London, November 3, 2022), <https://www.economist.com/europe/2022/11/03/as-turkey-imposes-a-harsh-disinformation-law-critics-fear-the-worst>. Accessed 21 January 2023

<sup>69</sup> The Economist, “As Elections Approach, Turkey’s President Finds Enemies Everywhere,” June 9, 2022, <https://www.economist.com/europe/2022/06/09/as-elections-approach-turkeys-president-finds-enemies-everywhere>. Accessed 21 January 2023

<sup>70</sup> The Economist, “As Turkey Imposes a Harsh ‘Disinformation’ Law, Critics Fear the Worst.”

<sup>71</sup> The Economist, “Turkey’s Centenary Could Mark the End of the Erdogan Era.”

<sup>72</sup> The Economist, “Meet Turkish President Erdogan’s Presumptive Challenger” (London, March 10, 2022), <https://www.economist.com/europe/2022/03/10/meet-turkish-president-erdogans-presumptive-challenger>. Accessed 21 January 2023

may refocus attention domestically. Ultimately, the outcome of the upcoming Turkish election could have long-term regional impacts in Eurasia and Africa.

### *Diplomatic*

Turkish foreign policy has created friction with other NATO alliance members including France, Greece, and the United States. Turkey, France, and America supported opposing sides in the Syrian civil war. France and Turkey were also on opposing sides in the Libyan conflict.<sup>73 74</sup> In 2019, suspicious of Turkish-Russian relations, the United States halted sales of F-35 fighter jets and imposed targeted sanctions on Turkish officials after they negotiated an arms deal with the Kremlin.<sup>75 76</sup>

There are also indications that the Greek-Turkish rivalry could turn into a hot conflict. Turkey's intervention in Libya has facilitated dubious agreements granting Turkish drilling rights within Greece's claimed exclusive economic zone. Tensions are stoked by allegations that Erdogan is transforming the Eastern Mediterranean into a "Turkish Sea" and intends to seize Greek islands.<sup>77 78</sup> These diplomatic rows are not simply a handful of bilateral issues but a serious threat to NATO cohesion. President Macron of France, referencing Turkish foreign

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<sup>73</sup> Karim Mezran and Federica Saini Fasanotti, "France Must Recognize Its Role in Libya's Plight," Atlantic Council, July 21, 2020, <https://www.atlanticcouncil.org/blogs/new-atlanticist/france-must-recognize-its-role-in-libyas-plight/>. Accessed 21 January 2023

<sup>74</sup> Louis Dugit-Gros, Pierre Morcos, and Soner Cagaptay, "French-Turkish Relations: Foes to Friends?," The Washington Institute for Near East Policy, April 20, 2022, <https://www.washingtoninstitute.org/policy-analysis/french-turkish-relations-foes-friends>. Accessed 21 January 2023

<sup>75</sup> The Economist, "Turkey's Row with America over Russian Military Hardware" (London, July 26, 2019), <https://www.economist.com/the-economist-explains/2019/07/26/turkeys-row-with-america-over-russian-military-hardware>. Accessed 21 January 2023

<sup>76</sup> Michael R Pompeo, "The United States Sanctions Turkey Under CAATSA 231," U.S. Department of State, December 14, 2020, <https://2017-2021.state.gov/the-united-states-sanctions-turkey-under-caatsa-231/index.html>. Accessed 21 January 2023

<sup>77</sup> The Economist, "Turkey Is Wielding Influence All over the Arab World."

<sup>78</sup> Ryan Gingeras, "Why Erdogan Might Choose War With Greece," War On The Rocks, October 5, 2022, <https://warontherocks.com/2022/10/why-erdogan-might-choose-war-with-greece/>. Accessed 21 January 2023

policy, lamented the "brain death" of NATO, seeing Turkey as a threat to the health of the alliance.<sup>79</sup>

If Macron's opinion becomes widespread, it could threaten Erdogan's strategic vision. The EU-Turkish customs union is critical to Turkey's economic growth and could be vulnerable if Turkey continues to alienate key European powers.<sup>80</sup> Additionally, despite a growing domestic defense industry, Turkey still relies on America for many components and high-end systems.<sup>81 82</sup> A serious diplomatic rift with the United States could weaken Turkish military power and undermine its security partnerships.

### **Conclusions and Recommendations**

Although Turkey faces challenges, it will likely grow into a major regional power. Turkey's economy defies expectations despite shaky monetary policy and is expanding briskly. GDP growth was 11% in 2021 and nearly 4% in 2022.<sup>83 84</sup> Its agreements with Qatar and Russia provide hard currency to shore up the lira.<sup>85 86</sup> Additionally, Turkish industry has proved adept at maintaining productivity and holding foreign assets to hedge against currency depreciation and inflation.

While political changes could alter foreign policy, this is unlikely to significantly diminish Turkish activities abroad. As a net energy importer, Turkey's need for hard currency

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<sup>79</sup> Dugit-Gros, Morcos, and Cagaptay, "French-Turkish Relations: Foes to Friends?"

<sup>80</sup> Dugit-Gros, Morcos, and Cagaptay, "French-Turkish Relations: Foes to Friends?"

<sup>81</sup> Economist, "Turkey Is the Arms Industry's New Upstart."

<sup>82</sup> Reuters, "U.S. May Approve F-16 Sale to Turkey in Two Months, Erdogan's Spokesman Says," Reuters, November 4, 2022, <https://www.reuters.com/world/us-may-approve-f-16-sale-turkey-two-months-erdogans-spokesman-says-2022-11-04/>. Accessed 21 January 2023

<sup>83</sup> The Economist, "How Has Turkey's Economy Kept Growing despite Raging Inflation?"

<sup>84</sup> The Economist, "Economic Data, Commodities and Markets."

<sup>85</sup> The Economist, "How Qatar and Turkey Came Together."

<sup>86</sup> The Economist, "The Connection between Russian Sanctions and Bizarre Turkish Monetary Policy."

will require trade agreements. To continue flourishing, its construction conglomerates will thirst for foreign customers, driving future diplomatic efforts into new markets, especially as Chinese investment recedes.

If distrust of Western powers persists, Russia continues to weaken, and China and Iran refocus inward, aggressive foreign policy will tempt whoever governs in Ankara. Hope that a new government will foster increased deference to NATO may prove futile. While new leadership may tone down rhetoric, any democracy will reflect popular opinion. The Turkish are suspicious of the West. Recent polls show 65% of Turks distrust NATO, and 46% see the United States as a threat.<sup>87 88</sup> Lack of support in Turkey's struggle against the PKK and the U.S. debacle in Iraq have eroded Western credibility. It is unlikely that any elected government would defy popular opposition and yield to the United States in international affairs.

The United States must consider Turkey's rise and be aware of the strategic risks and opportunities. The National Security Strategy issued by the Biden administration mentions NATO 15 times but Turkey only once. Though the administration prioritizes NATO unity, this fails to acknowledge the reality of diverging interests and an independent, aggressive Turkish state. Turkey must be engaged seriously, and its concerns considered. The country's geography, powerful military, and growing industrial complex make it too valuable an ally to be dismissed. Its growing international footprint and decisive military victories are proof of its ability to support allies and accomplish its strategic goals.

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<sup>87</sup> The Economist, "Is Turkey More Trouble to NATO than It Is Worth?" (London, June 16, 2022), <https://www.economist.com/europe/2022/06/16/is-turkey-more-trouble-to-nato-than-it-is-worth>. Accessed 21 January 2023

<sup>88</sup> Laura Silver, "U.S. Is Seen as a Top Ally in Many Countries – but Others View It as a Threat," Pew Research Center, December 5, 2019, <https://www.pewresearch.org/fact-tank/2019/12/05/u-s-is-seen-as-a-top-ally-in-many-countries-but-others-view-it-as-a-threat/>. Accessed 21 January 2023

A stronger relationship with Turkey would strengthen U.S. strategic positions in Eurasia and Africa and prove invaluable for the United States. Partnering on common interests such as Iranian containment, competition with China in Africa, and combating terrorism in Somalia and the Sahel could soften an increasingly adversarial relationship. Working on solutions to Turkey's conflict with Kurdish militants and listening to regional concerns, especially in Iraq, Syria, and Libya, would also foster a better partnership.

Most importantly, the United States must do everything possible to de-escalate the Turkish-Greek rivalry. A conflict between NATO nations could undermine the global status quo and drive Turkey from the alliance and into a military partnership with Russia. Finally, the United States must bolster its reputation among Turkish citizens and build trust through diplomatic engagement and well-publicized partnerships. A powerful and influential Turkey is inevitable, but competition with the United States is not. Further alienation could breed a formidable Russian-aligned regional adversary. Through focused diplomacy and mutual respect, the United States can seize opportunities and mitigate risks associated with Ankara's ascendance.

## Appendix A: CSTO and OTS

### Russian-Led Collective Security Treaty Organization<sup>89</sup>



### Turkish-Led Organization of Turkic States (Formally Turkish Council)<sup>90</sup>



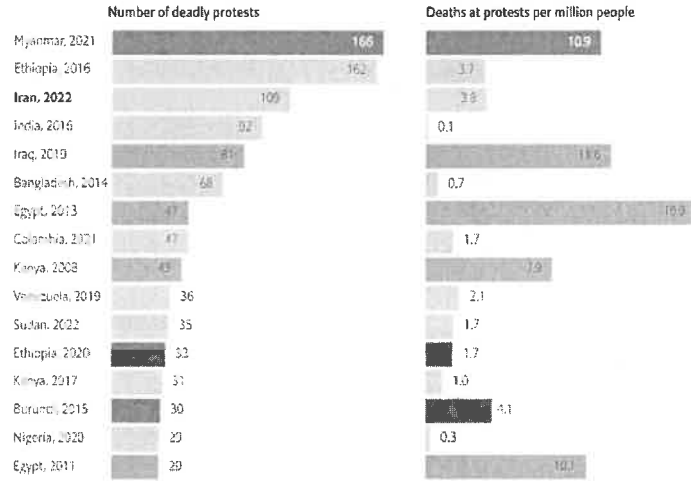
<sup>89</sup> Graphic Source: Chris Rickleton, "Russia's Unhappy Club: The CSTO," Radio Free Europe/Radio Liberty, October 12, 2022, <https://www.rferl.org/a/russia-club-csto-ukraine-military-alliance/32079498.html>.

<sup>90</sup> Chris Devonshire-Ellis, "Organisation Of Turkic States Meets In Istanbul," Silk Road Briefing, February 15, 2022, <https://www.silkroadbriefing.com/news/2022/02/15/organisation-of-turkic-states-meets-in-istanbul/>.

## Appendix B: Iranian Protests in Perspective<sup>91</sup>

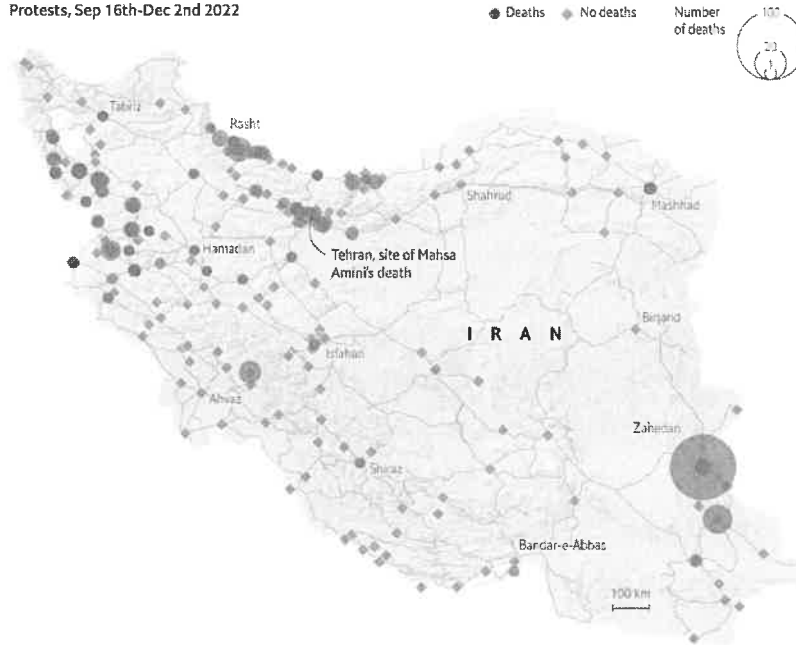
**Deadliest episodes of protest recorded by ACLED\***  
Total within a 90-day period

Outcome: ■ New government ■ Civil war/coup attempt ■ Other/ongoing



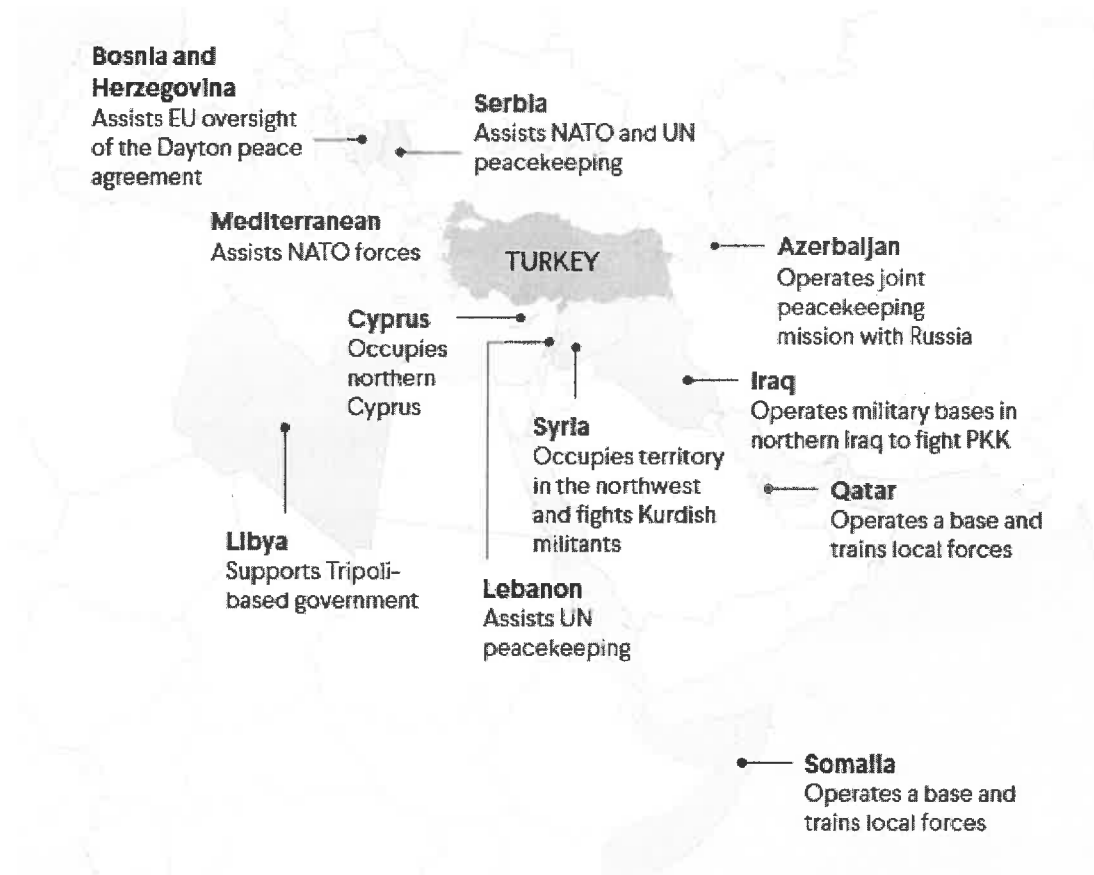
\*Countries with over 10m people and deadly protests on an annual basis. Only the episode with most deaths shown. Data starts between 1997 and 2021, depending on country. Source: ACLED, press reports.

**Protests, Sep 16th-Dec 2nd 2022**



<sup>91</sup> Graphics source: Economist, "Protest Movements as Deadly as Iran's Often End in Revolution or Civil War."

## Appendix C: Turkey's Military Presence Abroad Overview<sup>92</sup>



<sup>92</sup> Kali Robinson, "Turkey's Growing Foreign Policy Ambitions," Council on Foreign Relations, August 24, 2022, <https://www.cfr.org/background/turkeys-growing-foreign-policy-ambitions>.

### Appendix D: Armenia/Azerbaijani Conflict Geography<sup>93</sup>



The warring states are surrounded by superpowers. Russia and Iran traditionally support Armenia, while Turkey is allied with Azerbaijan. Ownership of Nagorno-Karabakh is a source of conflict.

<sup>93</sup> Graphic Source: The Economist, "The Azerbaijan-Armenia Conflict Hints at the Future of War" (London, October 8, 2020), <https://www.economist.com/europe/2020/10/08/the-azerbaijan-armenia-conflict-hints-at-the-future-of-war>.

### Appendix E: Increasing Turkish Engagement in Africa



President Erdogan has visited more African countries than any other non-African leader.

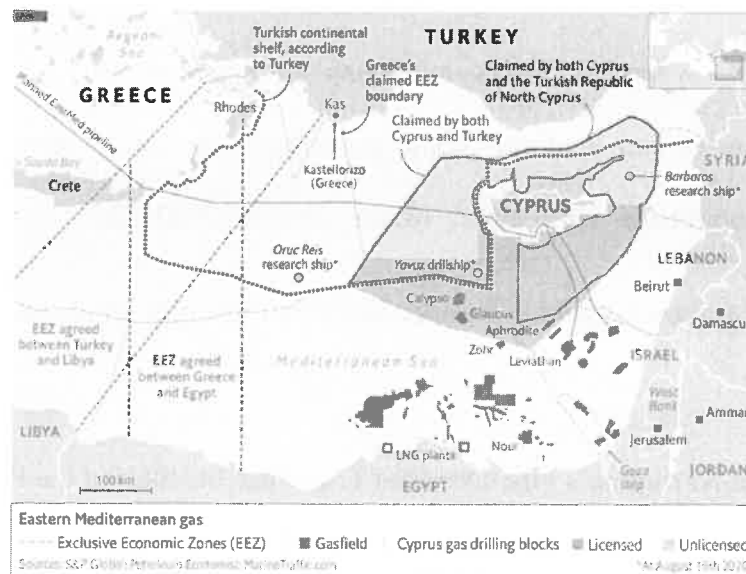
<sup>94</sup> Graphic Source: Economist, "Turkey Is Making a Big Diplomatic and Corporate Push into Africa."

<sup>95</sup> Graphic Source: Charlie Mitchell, "Erdogan's Ambition Drives Turkey's Africa Surge," African Business, March 17, 2021, <https://african.business/2021/03/trade-investment/erdogans-ambition-drives-turkeys-africa-surge/>.

## Appendix F: Sources of Potential Greek/Turkish Conflict



Overlapping exclusive economic zones (EEZs) and a brewing crisis over Kastellorizo, a Greek-claimed island that Turkey has threatened to seize, stoke conflict.<sup>96</sup>



Turkey's agreement with Libya conflicts with Greek claims.<sup>97</sup>

<sup>96</sup> Graphic Source: The Economist, "Might Turkey Seize a Tiny Greek Island?" (London, 2023), <https://www.economist.com/international/2020/08/20/a-row-between-turkey-and-greece-over-gas-is-raising-tension-in-the-eastern-mediterranean>.

<sup>97</sup> Graphic Source: The Economist, "A Row between Turkey and Greece over Gas Is Raising Tension in the Eastern Mediterranean" (London, August 20, 2020), <https://www.economist.com/international/2020/08/20/a-row-between-turkey-and-greece-over-gas-is-raising-tension-in-the-eastern-mediterranean>.

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[decline?check\\_logged\\_in=1&utm\\_medium=promo\\_email&utm\\_source=lo\\_flows&utm\\_campaign=registered\\_user\\_welcome&utm\\_term=email\\_1&utm\\_content=20221229](https://www.foreignaffairs.com/ukraine/russia-dangerous-decline?check_logged_in=1&utm_medium=promo_email&utm_source=lo_flows&utm_campaign=registered_user_welcome&utm_term=email_1&utm_content=20221229).

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